

Selling Domestic and General Warranties

Domestic and General Warranty Sales

Procedure Guide for NCompass

NCompass Versions 11.14.0 (and Above)

This guide covers your core system please keep it to hand for reference.

Rev. 1.0

Authors DP

Need further help?

Call Support on 0845 125 9193

You can also email support@findesolutions.com

Your Calculus Software Solutions support cover:

Monday – Friday 9am-5pm	For the duration of your contract.
Outside the above hours, including weekends	£75 plus VAT per incident

For help using your system, please call 0845 125 9193

For out of hours Support 0845 833 9196

For sales enquiries such as till rolls or system upgrades, please call 0845 125 9192

For VeriFone queries, please call their Helpline on 08444 828222.

[Overview](#)

[In Store Warranty Sales](#)

[Selling warranties with the products](#)

[Selling a warranty for a previously sold product](#)

[Promoted Warranties](#)

Overview

NCompass Advanced Retail now supports direct integration for Domestic and General warranties, for both sale and submission.

Schemas include

In store term warranty

In store monthly warranty

Online term warranty

If you want to be able to sell online monthly warranty, this will require extensions and development to your website, currently we do not offer the facility to sell monthly warranties via your website

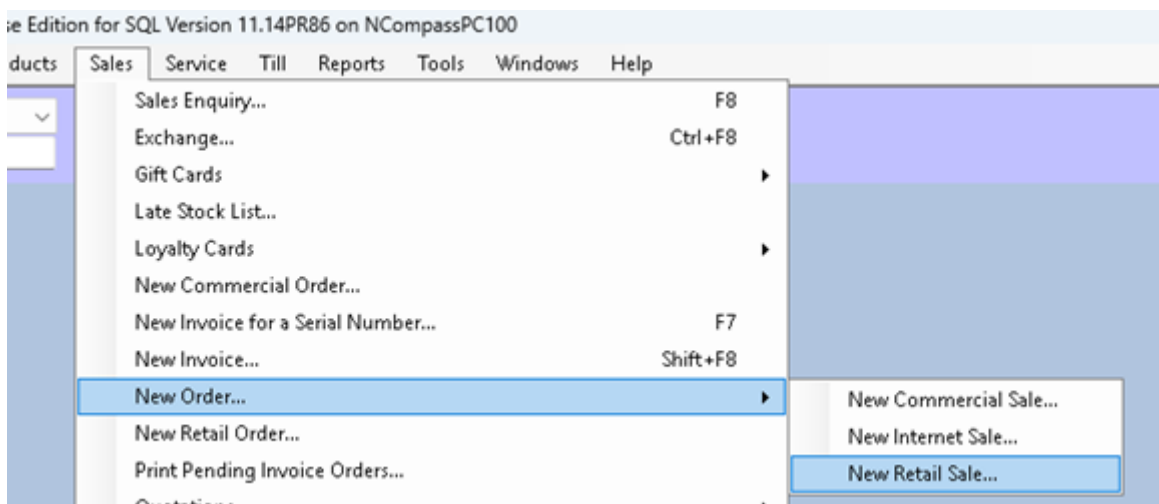
In Store Warranty Sales

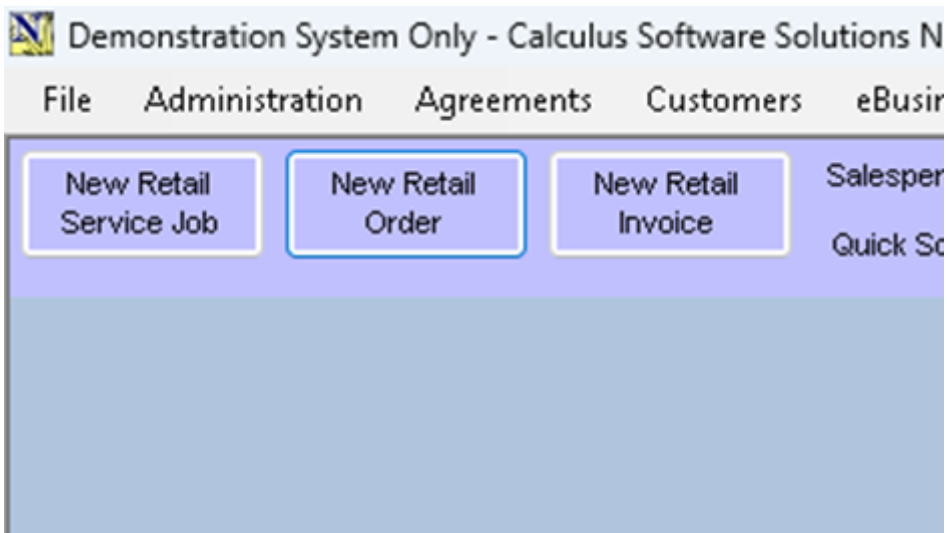
NCompass can 'Prompt' the salesperson to add the warranty to the sale each time an item is added to the sales order or invoice.

If you want to sell a warranty for a product that's already sold, this is also supported

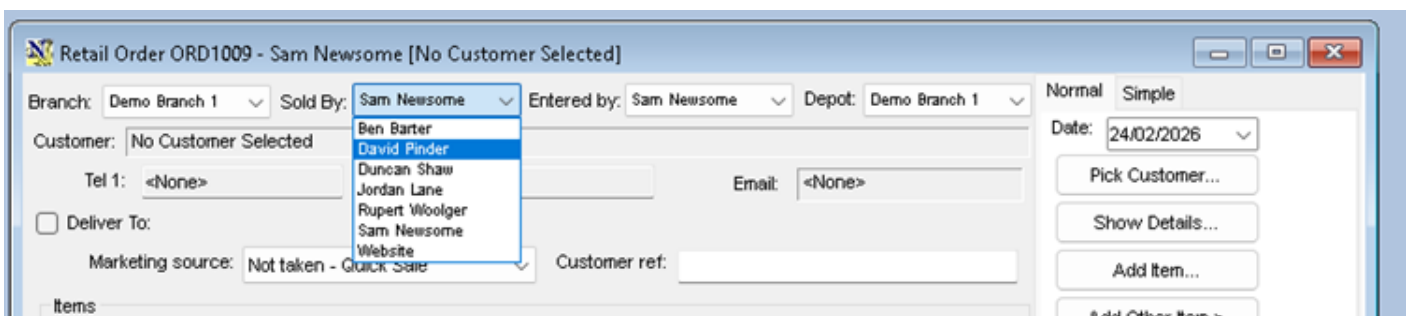
Selling warranties with the products

Start the sale process in the normal way usually this is via a sales order





Sign into the sales order window in the normal way



Then Select Pick Customer

Search for your customer

Customer Enquiry for Retail Order ORD1009 - Sam Newsome [Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD]

Search Details

Surname: pin Search

Forename: SmartMatch

Telephone:

Postcode: ng

Company / Address:

Email:

Account No:

Branch: Category:

Date of Birth: To Over 18

Account/Cash Customers

CustomerID: NCCRM/ No Customer

Include Expired Entries

Enter the details to match - any left blank will be ignored.
CustomerID is just the number portion, and must be exact;
Address will find the entry anywhere in the address fields;
Other items will only match items beginning with the data entered.

If you have a customer card, scan or swipe it to find that customer

Current Matches (Exact)

Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD

Details... Items... History... Select

Ledger... Agreements... Sales... Service Jobs...

New... Cancel

If your customer is already in NCompass, Highlight and click Select

If your customer is not found

Click 'New'

Mr Pin, NG - New Customer

CustomerID: <No ID Available> Hot-links Tools

Customer Details

	Title	Initials	Forename	Surname
Name:	Mr			Pin

Company/
Address:

County: Postcode: NG !

Country: [Not set] v

Summary: Mr Pin, NG

Telephone: Two:

Mobile No: 07999895631 31 Fax:

Main Email: PINNNNN@test.com

Alt Email:

Website: Expired

Web Login... Show Map... Send Text...

Save Cancel Attachments... Extra >

Standardise Case
 Show Expired

Fill in the customer details and then click Save

Note: its important you get full customer details, full title, initial, Surname, correct address, postcode email and telephone numbers

Click 'Save'

Now Add your product to the sales

Click 'Add Item'

Product Enquiry for Retail Order

Search Details

Manufacturer: Search

Model/Part No: Advanced

Stock/Serial No:

Quick Search:

Retail Price from: to

Supplier:

Updated After: 23/02/2026 Before: 24/01/2026

Channel

Product Grade

New Stock PO for Stock Only

SIH Stock Only Include Expired Products

Barcode/Shortcode: Scan

Fill in any combination of the above boxes, or scan a bar-code.
Use a * to match zero or more characters.
Use a ? to match exactly one character.
You only need complete the first part of the manufacturer or model

Standard Detailed

Product	Price	B/Free	C/Free	C/BO	C
Blomberg LWA29461W 9kg 1400 Spin SpinSave ...	429.99	8	8	0	0

Branch: Demo Branch 1 - available stock

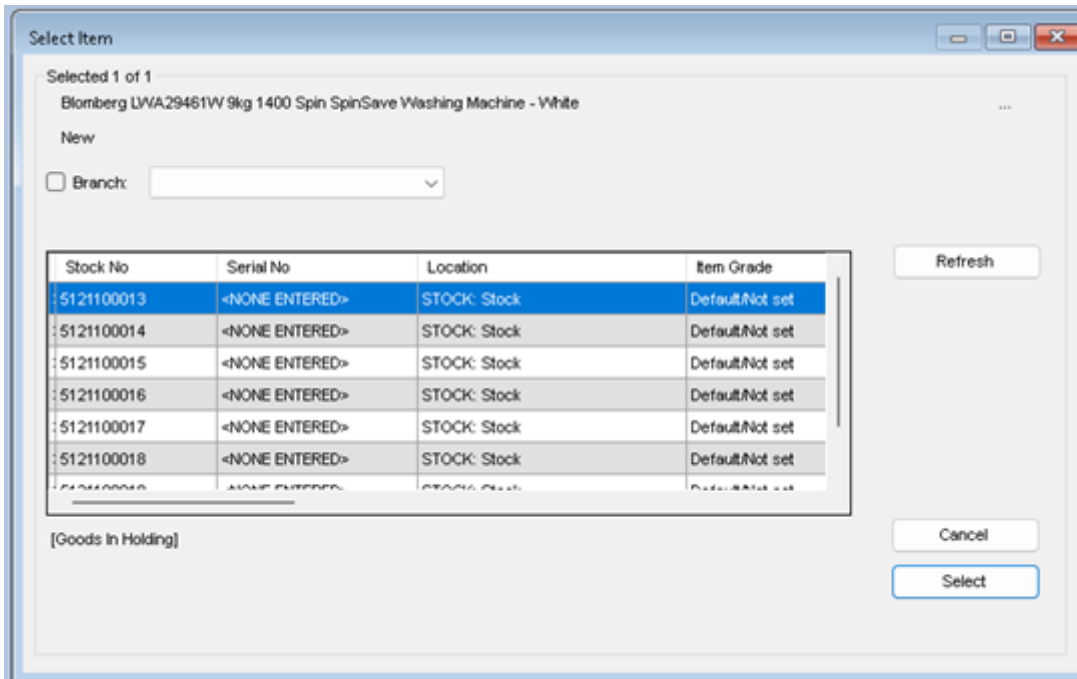
Rental Price: No rate set

Retail Prices: Retail [1.00+]: 429.99 ex VAT: 358.33

Select Stock... Product Info...

More > Variant Matrix... Link EPI+ Product(s)... Create Special Order... Cancel

Search for your item the click' Select '



Depending on your system settings, you may or may not be required to pick a stock number, if required pick the first available stock number

Highlight and Click 'Select'

You will then be presented with the price confirmation screen

Item Price

Item Quantity

Quantity required:

Allocate stock from:

Stock Number:

Price per item

Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White

Our List Price:

Discount %: Discount Inc VAT:

Unit Selling Price Ex VAT:

Unit Selling Price Inc VAT:

New: Default/Not set

This is an Agency product for Euronics Agency

If you're changing the price, you must do it before proceeding, as the next step will check the warranty category and retail price

Click 'Confirm'

If your system is set to not to prompt for warranties, you will be returned to your sales order, however it's our recommendation that 'Prompt for Warranty' is turned on for all product categories, and the next window that opens is a list of available warranty purchase options

The Warranty window will do a live call to Domestic and Generals system to check the warranty rates and update if required, this should only take a few seconds and then you will be presented with the list

The screenshot shows a software window titled "Extended Warranty Options". It is divided into several sections:

- Item Details:** Product: Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing, Price: 199.99, Stock No: 5121100013, Manufacturer's Parts: 36, Manufacturer's Labour: 36, Serial No: <NONE ENTERED>, Listed Warranty Scheme: WASHING MACHINE-36-249.
- Extended Warranty:** Scheme: WASHING MACHINE-36-249 (dropdown), Show Expired: . Max days for scheme: 30, DOP: 24/02/2026. A table lists options with columns for Labour (months), Parts (months), Price, and Availability. The first option is selected: 5 years, 60 months Labour, 60 months Parts, Price 143.00. Other options show 0 months Labour and Parts with prices of 0.00.
- Purchase Details:** List Price: 143.00, Price includes accidental damage @ £0.00, Voucher Code: (empty field), Price ex VAT: 119.17, Price Inc VAT: 143.00. Buttons include "Cancel - No Warranty Required" and "Confirm Warranty Purchase".

	Labour (months)	Parts (months)	Price	Availability
<input checked="" type="radio"/> 5 years:	60	60	143.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	

There may be more than one warranty purchase option available

This will show both term warranty.

36-month, 60-month, and the term includes the manufacturers original warranty

And monthly warranties, where the term will be set to 1 month and the price shown is the monthly price

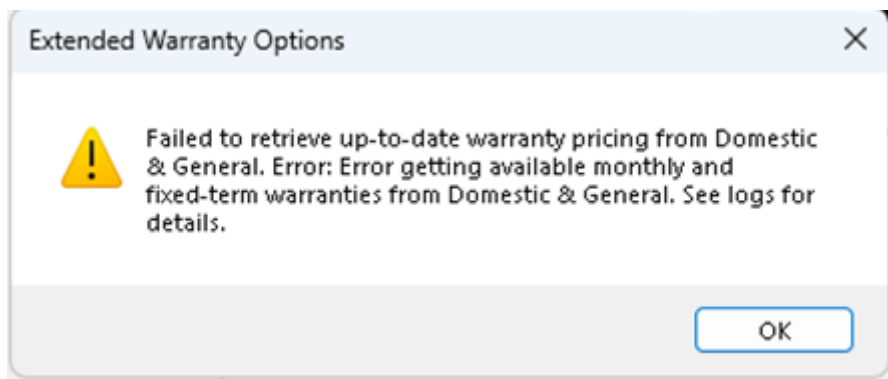
Select the desired warranty option and the price will update, not you should not try and change the warranty price, if you do the warranty submission may be rejected

Click 'Confirm Warranty Purchase' to continue with the sale and include the selected warranty

Or

Click 'Cancel – No Warranty required'

Note: if for any reason there is no access to Domestic and General's systems the rate will not be able to be confirmed, and you will not be able to sell the warranty



If this happens, check your internet access and the service status with Domestic and General

You can always return to the sales order later to add the warranty to the sales order.

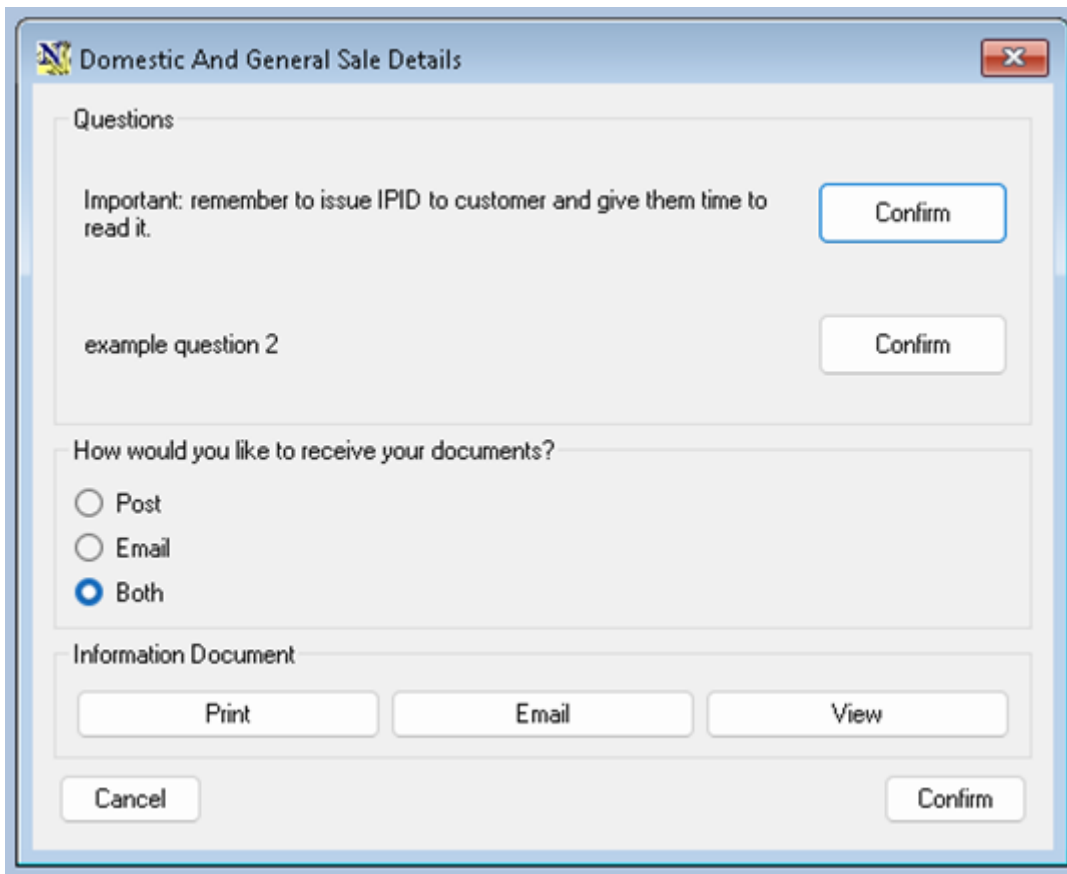
Complete the IPID requirements

IDIP = Insurance Product Information Document

The PDF is stored the normal reports folder, and can be printed emailed or viewed directly from NCompass

This document can be different based on the warranty type, Monthly / Term

, It's a requirement that the customer gets a copy of the IPID and has a chance to read through the basic terms before accepting the warranty sale, Domestic and General may also require confirmation of any questions or statements before the warranty can be purchased, so the following window will open



The screenshot shows a software window titled "Domestic And General Sale Details" with a close button in the top right corner. The window contains the following elements:

- Questions Section:**
 - Text: "Important: remember to issue IPID to customer and give them time to read it." with a "Confirm" button to its right.
 - Text: "example question 2" with a "Confirm" button to its right.
- Document Delivery Section:**

How would you like to receive your documents?

 - Post
 - Email
 - Both
- Information Document Section:**

Information Document

 - Buttons: "Print", "Email", "View"
- Footer:**
 - Buttons: "Cancel" (left), "Confirm" (right)

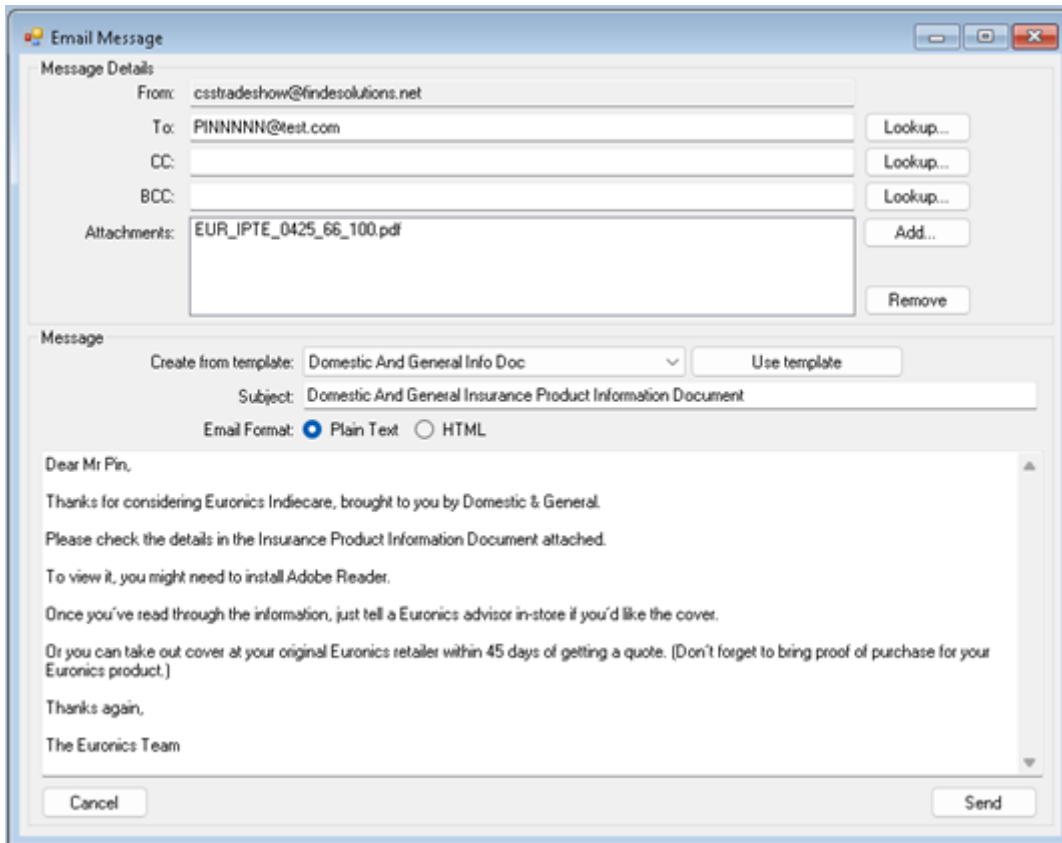
Confirm Any Questions

Select the warranty Document delivery method (this defaults to both)

If there are any questions or statements that require confirmation, they must be read out to the customer and then confirmed, normally for Domestic and General the only question will be to confirm that the customer has received read the IPID

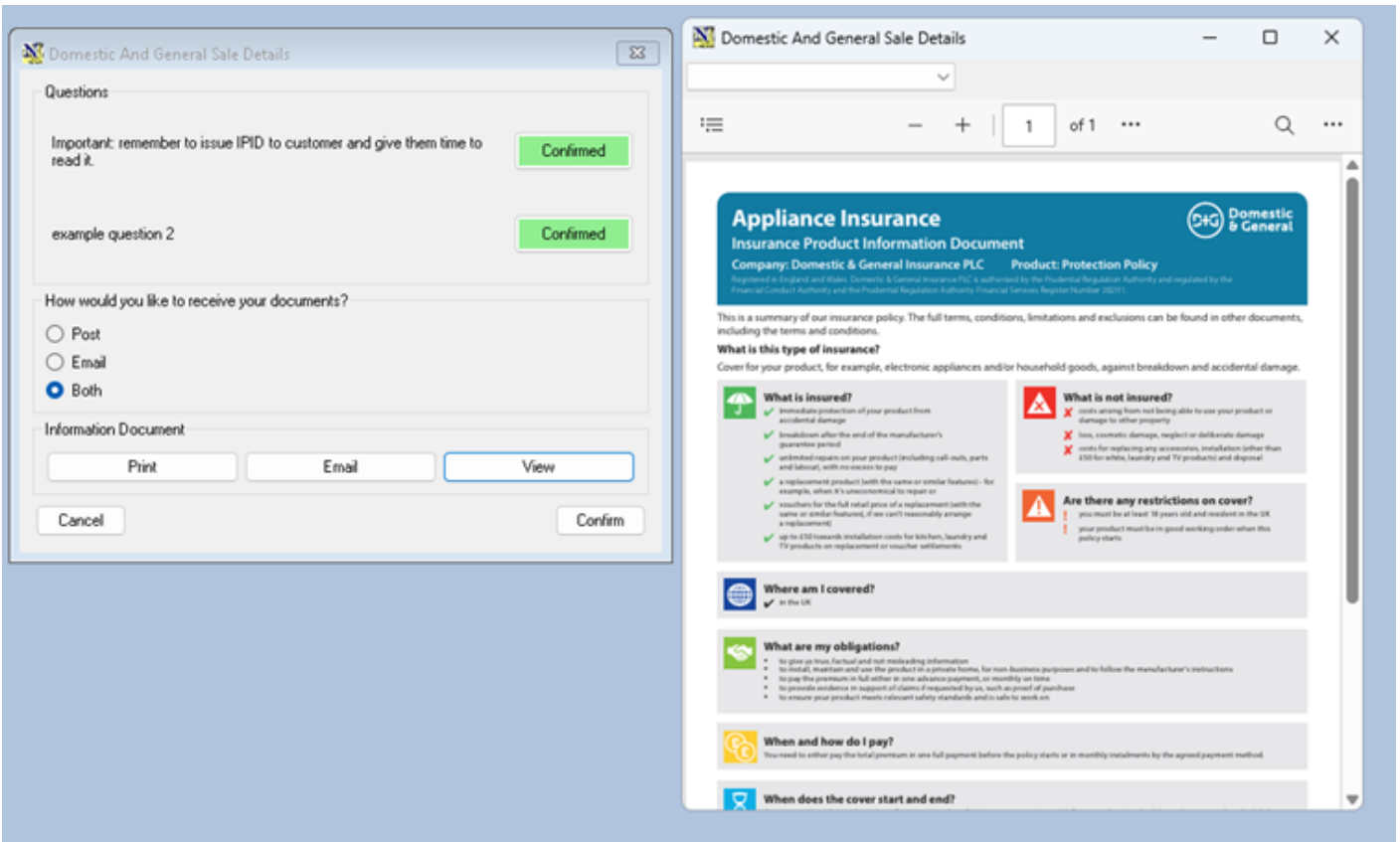
Print Will send the correct IPID PDF to the default A4 Printer

Email will open up the NCompass Email client with the customers email address and a email template with the correctly worded text, and the PDF attached



Click 'Send'

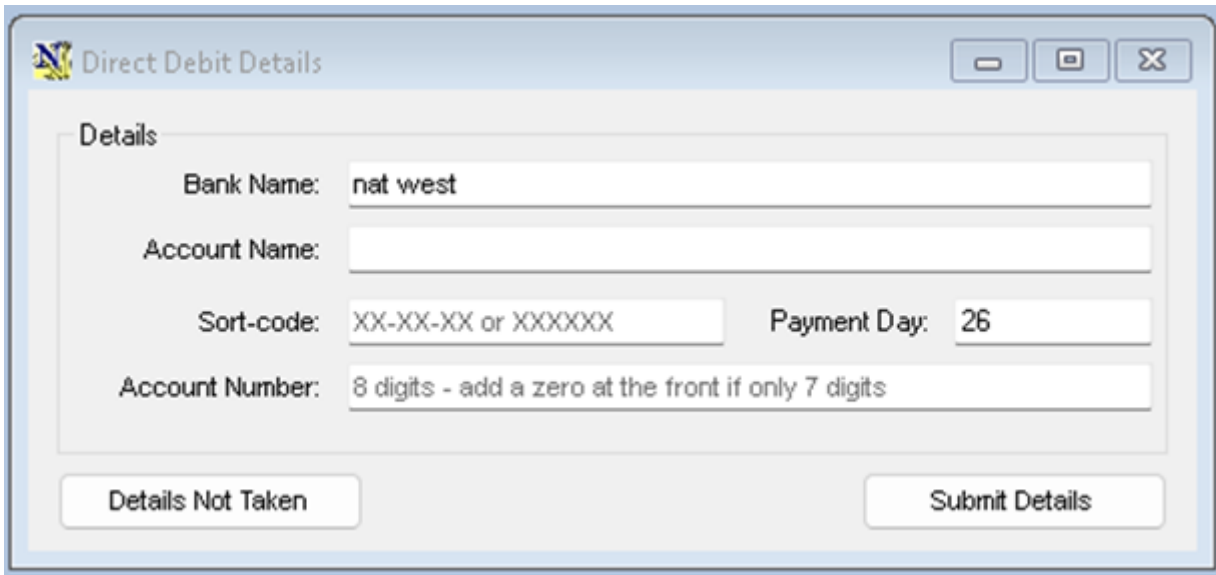
View will open the PDF in a mini-Browser



Once the customer has received / viewed the IPID you can Continue

Click 'Confirm'

If a monthly warranty has been selected, you will be prompted to collect the customers Direct Debit details

A screenshot of a web form titled "Direct Debit Details". The form has a light blue header with a logo on the left and three window control buttons (minimize, maximize, close) on the right. Below the header is a section titled "Details" containing four input fields: "Bank Name" with the value "nat west", "Account Name" which is empty, "Sort-code" with the placeholder "XX-XX-XX or XXXXXX", and "Payment Day" with the value "26". Below these fields is a label "Account Number:" followed by a text box containing the instruction "8 digits - add a zero at the front if only 7 digits". At the bottom of the form are two buttons: "Details Not Taken" on the left and "Submit Details" on the right.

Direct Debit Details

Details

Bank Name: nat west

Account Name:

Sort-code: XX-XX-XX or XXXXXX Payment Day: 26

Account Number: 8 digits - add a zero at the front if only 7 digits

Details Not Taken Submit Details

Enter the customer bank details

The payment day defaults to the current day, the customer can have the direct debit taken on any day from the 1st to the 28th

You cannot submit monthly warranties without bank details, if click 'details not taken', you will be prompted again when confirming the sale

Retail Order ORD1009 - Sam Newsome [Mr Pin, NG]

Branch: Demo Branch 1 Sold By: Sam Newsome Entered by: Sam Newsome Depot: Demo Branch 1

Customer: Mr Pin, NG

Tel 1: <None> Mobile: 0799989563131 Email: PINNNNN@test.com

Deliver To:

Marketing source: Customer ref:

Items - 1 item total over 2 lines

Product	Stock No	Serial No	Discount Group	Selling Price	Available From
Blomberg LWA29461W 9kg 1400 S...	5121100013	<NONE ENTER...	B - LIST PRICE I...	199.99	24.02/2026
Extended Warranty For Blomberg L...	5121100013	Parts: 60 Labo...		143.00	

Quantity: 1

No status; Assigned to Duncan Shaw 1 item, 2 lines **Total: £342.99**

Payment: 342.99

Defer Completion

ORD1009 Gift Receipt

Normal Simple

Date: 24.02/2026

Back at the sales order screen, you can now continue to add more products, if additional products also have a tagged warranty, the same process will be available for each product line

When the sale is complete

Click 'Confirm'

Complete Sale - ORD1009

Are you sure you wish to complete this Sale?

Delivery

Order Balance: 0.00

All items taken now

All items being collected later

All items being delivered by courier

All items being delivered by in-house delivery

Leave the current delivery/collection arrangements as they are

Advanced - a mixture of the above or raise an additional delivery note

None - this will be arranged later

Surveys

There are no surveys to complete

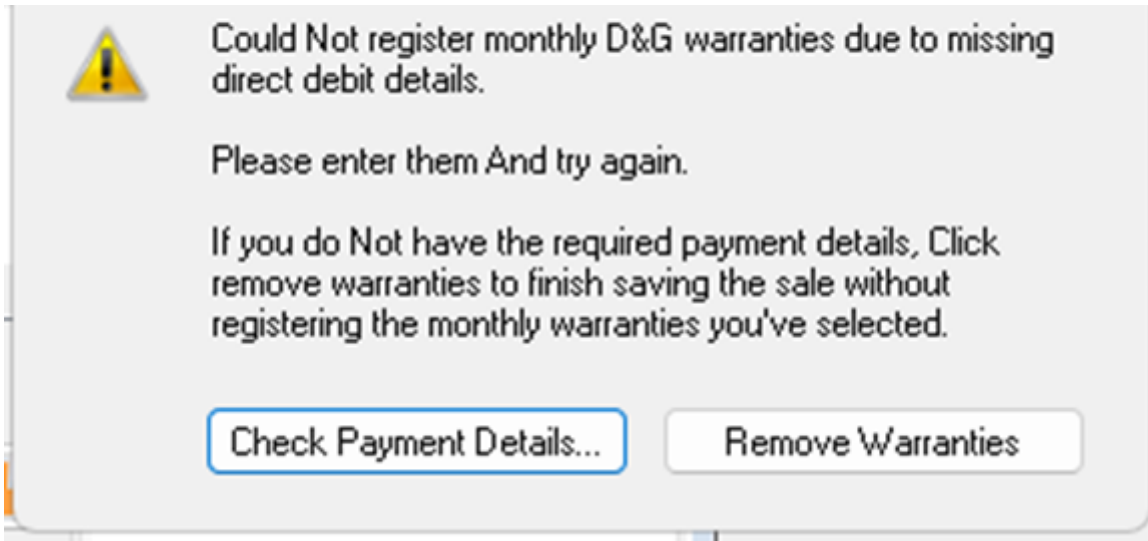
Receipt

Normal settings will be used to output a receipt

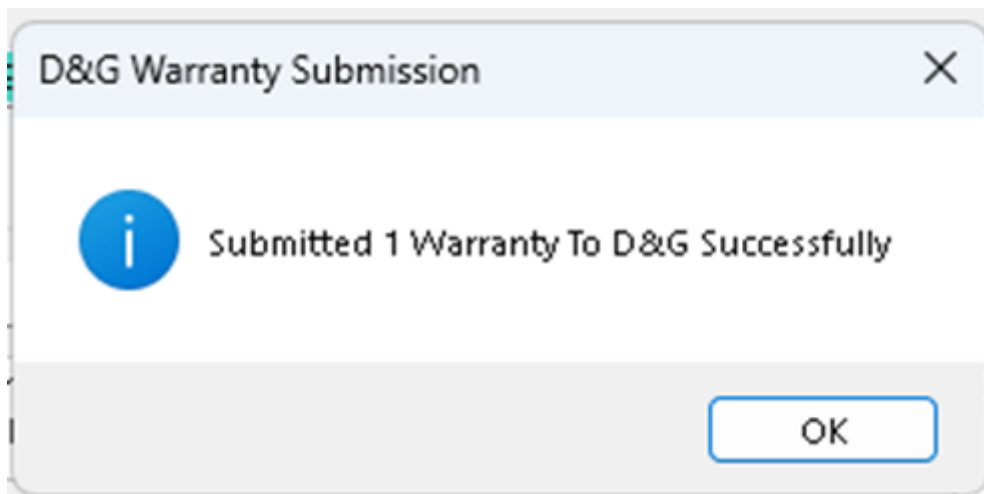
Select the item delivery / Shipping / Collection options required

Click 'Complete Sale'

If you have not taken the bank details and there is a monthly warranty present on the sale you get one final chance to enter them, monthly warranties can not be submitted without bank details



The Warranty Submission will now take place, there will be a short pause while NCompass connects to Domestic and Generals systems and submits the warranty, Once complete you will get a confirmation



If the Warranty Fails to submit you will be given a reason

The Warranty is automatically removed for the sales order and is replaced with a sundry line indicating the submission has been cancelled

Deliver To:

Marketing source: Customer ref:

Items - 2 items total over 2 lines

Product	Stock No	Serial No	Discour
Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White [Dem...	5121100014	<NONE ENTER...	
D&G Warranty Submission Failed, Warranty Not Processed			

Selling a warranty for a previously sold product

Start a new sales order

Add the customer on to the sales order

Click the Warranty button and select the option 'For another item'

Retail Order ORD1005 - Duncan Shaw [Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD]

Branch: Sold By: Entered by: Depot:

Customer:

Tel 1: Mobile: Email:

Deliver To:

Marketing source: Customer ref:

Items

Product	Stock No	Serial No	Discount Group	Selling Price

Quantity:

No status; Assigned to Duncan Shaw

0 items, 0 lines **Total: £0.00**

Normal Simple

Date:

This will bring up a list of the customers previous purchases

Customer Product List - Sold Items without Extended Warranty

Customer: Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD Pick Customer... Show Details...

Sale/Agreement Number: Include returned items

Product: <Click Pick Product, or scan a barcode now> Pick Product... Search

Include 'No Customer Selected' Show first: 200

Date	Type	Status	Reference	Salesperson	Price	Product	Manf	Manf	Extended Parts	Extended Labour	S
24/02/2026	Sale	Current	INV11172	Duncan S...	£429.00	Bosch PIE631BB5E 59 2cm Induction Hob - Black	24/02/2031	24/02/2031			51
24/02/2026	Sale	Current	INV11168	Duncan S...	£149.99	Bosch BCHF220GB Serie 2 2-in-1 Cordless Vacuum Cleaner - 44 Minutes ...	24/02/2028	24/02/2028			51
24/02/2026	Sale	Current	INV11167	Duncan S...	£339.73	Beko CEG7302B Bean To Cup Fully Automatic Espresso Machine - Black	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£366.91	Bosch WAN26282GB Capacity 8kg, 1400 rpm, SpeedPerfect, Active Wat...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£843.52	Bosch WAW26750GB Capacity 9kg, 1400 rpm, ActiveOxygen, Active Wat...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£416.42	Indesit EWDE861483W EWDE 861483 W UK 6kg Washer Dryer - White	24/02/2028	24/02/2028			51
24/02/2026	Sale	Current	INV11165	Duncan S...	£399.00	Bosch WAN26250GB Capacity 8kg, 1200 rpm, VarioPerfect, EcoSilence D...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11165	Duncan S...	£759.00	Bosch WTW67561GB Capacity 9kg, Heat Pump, SelfCleaning Condenser, ...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11163	Duncan S...	£269.00	Beko BMN3WT3821W 8kg 1200 Spin RecycledTub Washing Machine - W...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11158	Duncan S...	£269.00	Beko BMN3WT3821W 8kg 1200 Spin RecycledTub Washing Machine - W...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11153	Duncan S...	£429.99	Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White	24/02/2029	24/02/2029			51
24/02/2026	Sale	Current	INV11150	Duncan S...	£429.00	Bosch PIE631BB5E 59 2cm Induction Hob - Black	24/02/2031	24/02/2031			51

The list shows all stock controlled items the selected customer has purchased or rented. If Status is Expired, the item has been returned.

Barcode Scan Select Item History... Close

Highlight the item and Click Select

Proceed with the warranty purchase as above

Promoted Warranties

There is provision in the rates table / API call for promoted warranties, if a promoted warranty is available it will be shown in the warranty selection screen, the warranty name will be prefixed with [Promo]

The availability field will show when the promotion is valid until and under the selection table the promotional test will be shown

Max days for scheme: 30

DOP: 25/02/2026

	Labour (months)	Parts (months)	Price	Availability
<input checked="" type="radio"/> [PROMO] 2 years:	24	24	216.90	Available until 10/05/2026
<input type="radio"/> 3 years:	36	36	275.40	
<input type="radio"/> 4 years:	48	48	312.30	
<input type="radio"/> 5 years:	60	60	349.20	
<input type="radio"/>	0	0	0.00	

Durations are the total cover, including existing manufacturer warranty

20% warranty purchase discount

Purchase Details

List Price: 216.90

Cancel - No Warranty Required

Created 2026-02-26 15:14:53 UTC by David Pinder
Updated 2026-02-26 15:21:26 UTC by David Pinder